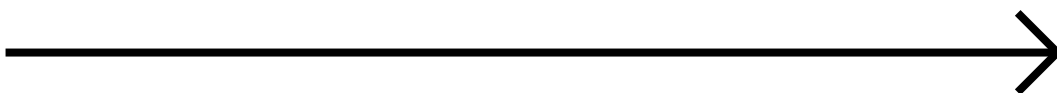




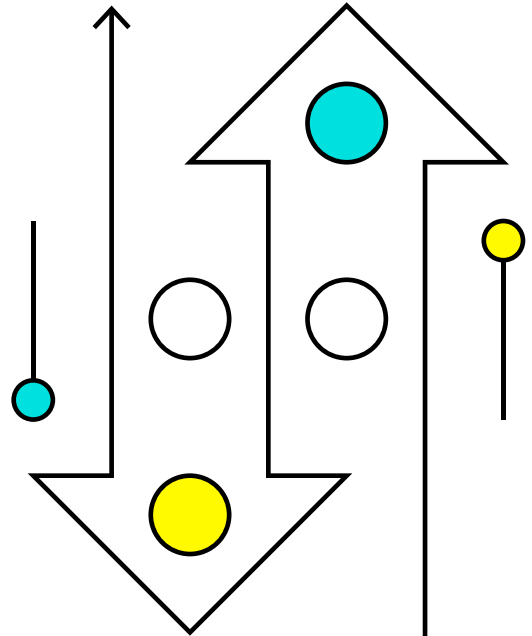
Sound Income Strategies
enhances trading efficiency
with intelliflo redblack



Customer profile

Sound Income Strategies, a privately owned, income-generating registered investment advisor (RIA) and money manager, has seen significant growth over the past three years, doubling its assets under management (AUM) from \$1.6 billion to \$3.2 billion. A key component of this growth was the firm's partnership with leading rebalancing and trading solution, intelliflo redblack.

When the firm first implemented intelliflo redblack in 2021, it gained a more sophisticated, multi-asset software platform that provides household-level rebalancing, advanced drift reporting, independent trading, FIX connectivity with block order capabilities, and integration with their key partners. Since then, the firm looked to address evolving trading nuances and scalability challenges through a strategic technology shift to intelliflo redblack's cloud version, supporting rapid growth and complex trading needs.





Challenge: the need for greater scalability and speed

Sound Income Strategies stands out among traditional RIAs as it operates as an advisory firm and as a money manager. This unique structure requires handling thousands of trades daily across numerous portfolios. Initially, the firm relied on the on-premises version of intelliflo redblack. As the firm expanded, the need for greater scalability and performance became apparent. In response, Sound Income Strategies decided to move to the cloud-based version of the platform.



We needed to be able to **handle the thousands of trades we execute daily** to support our business growth, **quickly and more efficiently**. We knew that moving to the cloud would give us the agility to scale quickly and efficiently as the number and sophistication of trades, portfolios, and exceptions keep growing."



Rana Chander, Chief Operating Officer
Sound Income Strategies



Solution: migrating to intelliflo redblack's cloud version

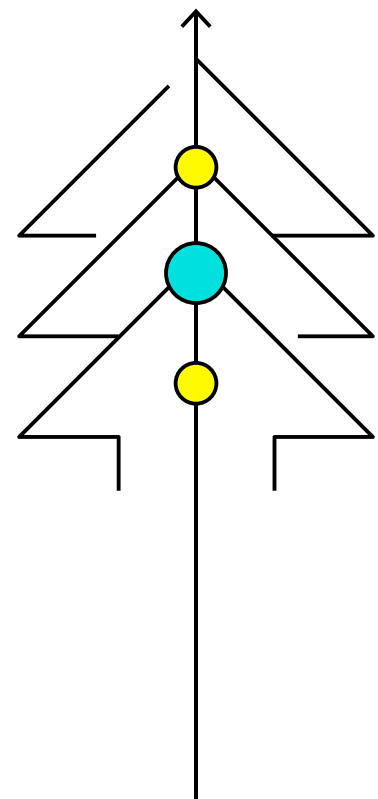
Sound Income Strategies transitioned to intelliflo redblack's cloud-based platform earlier this year, enabling the firm to gain access to enhanced scalability, real-time security pricing, and faster processing times. This shift was pivotal in meeting the firm's trading demands and aligning with its growth objectives, while seamlessly taking advantage of the latest platform enhancements.



The biggest difference with the cloud version is the **speed of the software, access to real-time pricing, and ensuring we have all the latest features without having to do upgrades.** The cloud version also facilitated the firm's goal of integrating different portfolios, akin to having a "test kitchen inside a kitchen," allowing advisors to bring their own equity models and combining them with the firm's core income portfolios."



Rana Chander, Chief Operating Officer
Sound Income Strategies





Results: streamlined operations and positioned for future growth

Since migrating to the intelliflo redblack cloud, Sound Income Strategies has seen substantial improvements in trading efficiency and operational capabilities. The enhanced platform positions the firm to achieve its goal of reaching \$10 billion in AUM by enabling the firm to handle more complex trading strategies and portfolio management at scale.

“

Our trading team is thrilled—they can now execute thousands of trades effectively. We're not just keeping up with our growth; we're setting ourselves up to **scale even further.**”

Rana Chander, Chief Operating Officer, Sound Income Strategies

Looking ahead, Sound Income Strategies plans to leverage intelliflo redblack's ongoing enhancements, including the introduction of hierarchy models that will allow even more customized advisor solutions. Through the intelliflo model marketplace, advisors will be able to bring their own projects in and choose what they want from specialized vendors, giving the firm's team more flexibility.

“

With intelliflo redblack as a trusted partner, we're confident in our path forward. **We're now better equipped** with the tools to manage our unique income-focused portfolios effectively.”

Rana Chander, Chief Operating Officer, Sound Income Strategies

About Sound Income Group

Sound Income Group comprises three full-service firms offering marketing, coaching, practice management, investment services, and franchise opportunities for the financial community. It operates Retirement Income Source®, a national network of Income Specialists who help clients establish steady streams of income; Sound Income Academy, a recruiting and marketing firm, and Sound Income Strategies, LLC, an SEC registered RIA with more than \$3 billion assets under management (AUM).

Discover how intelliflo redblack can help you

intelliflo redblack provides comprehensive rebalancing and trading capabilities with portfolio monitoring, pre-trade and post-trade compliance, and order management, all within a single solution that seamlessly integrates with your current tech stack.

[Book a demo](#)

